

TRANSFER OF WEALTH

*Imagine the Possibility of 5% for
Every Community in Eastern
Washington and North Idaho*

March 3, 2020



William A. Crosetto

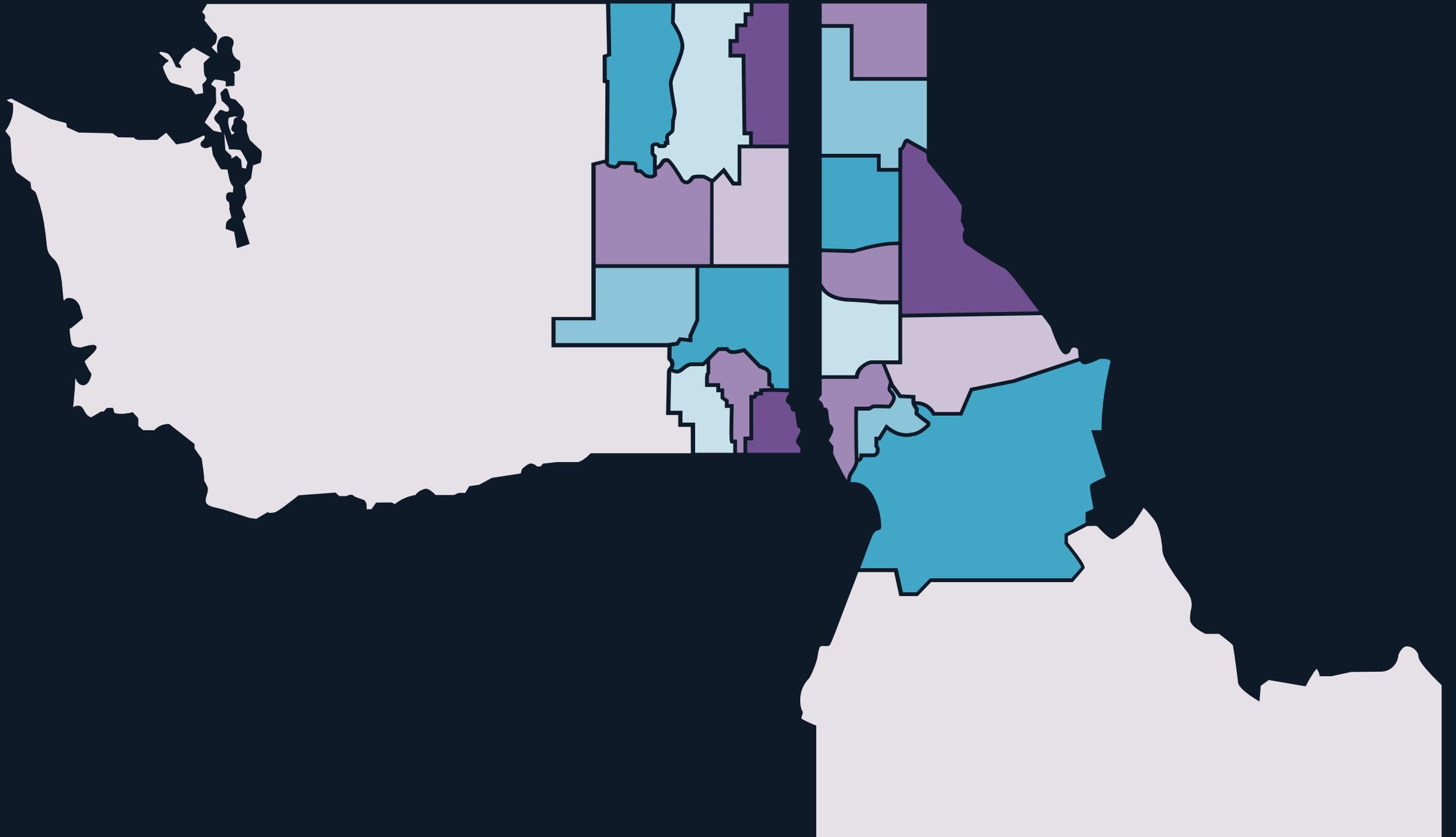


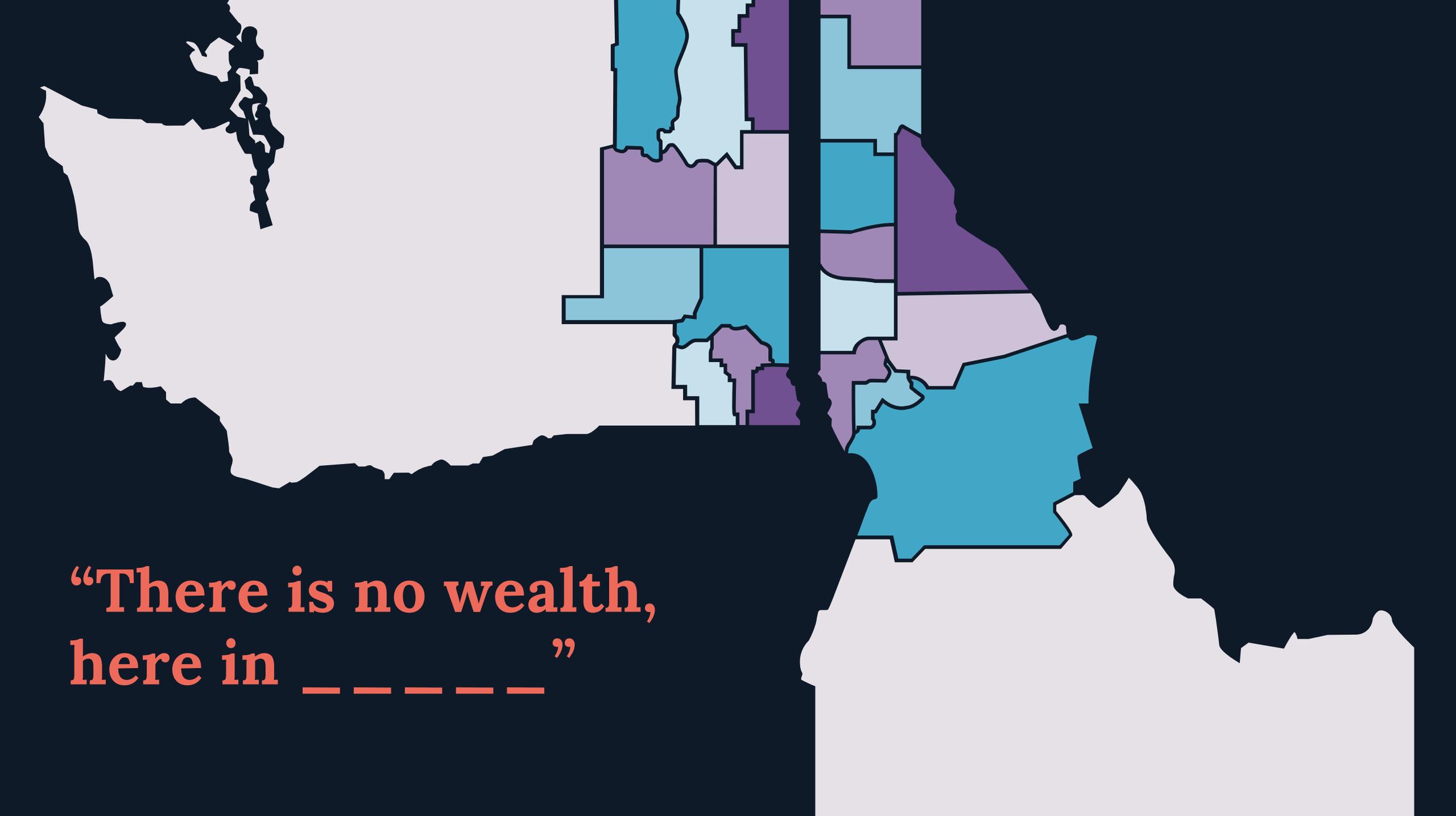
Rural Residency Fund

Rural Healthcare Initiative Fund

Rural Civic Engagement Fund

And more...





**“There is no wealth,
here in _____”**



WHO WE ARE

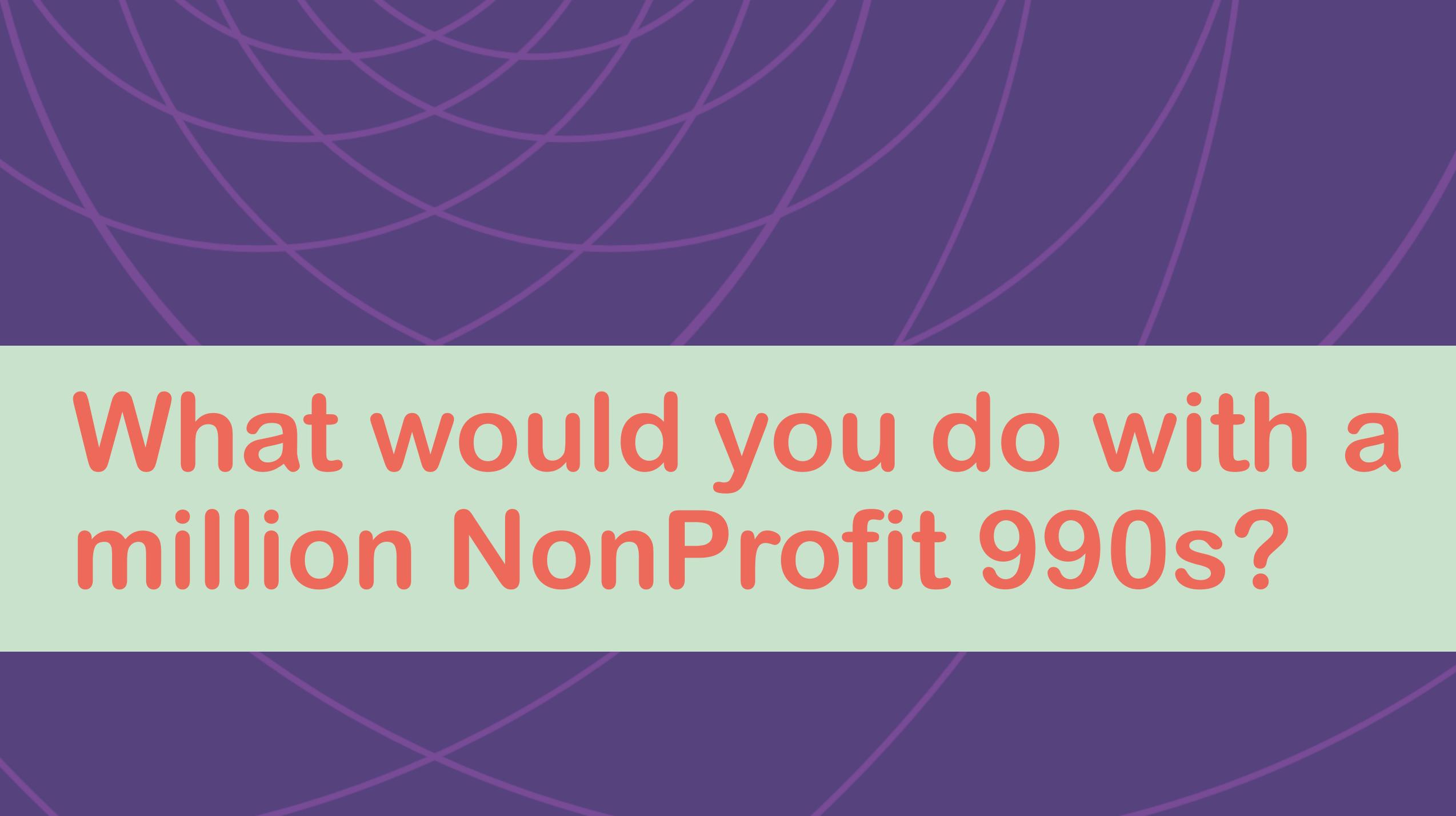
Innovia Foundation ignites generosity that transforms lives and communities. As the community foundation for Eastern Washington and North Idaho, we envision vibrant and sustainable communities, where every person has the opportunity to thrive.

**Russell James III, Ph.D.,
J.D., CFP**

Professor and Chair, Personal Financial
Planning

Texas Tech University





What would you do with a million NonProfit 990s?

5-YEAR AVERAGE GROWTH IN TOTAL FUNDRAISING

2010-2015

Nonprofits receiving ONLY CASH gifts

2,548 nonprofits raising \$1MM+ in 2010 reported only cash gifts in 2010 & 2015 on e-file IRS-990

11%
GROWTH

Nonprofits receiving SECURITIES NONCASH gifts

2,143 nonprofits raising \$1MM+ in 2010 reported securities gifts in 2010 & 2015 on e-file IRS-990

66%
GROWTH

THE CHRONICLE OF
PHILANTHROPY.

\$

Trillion

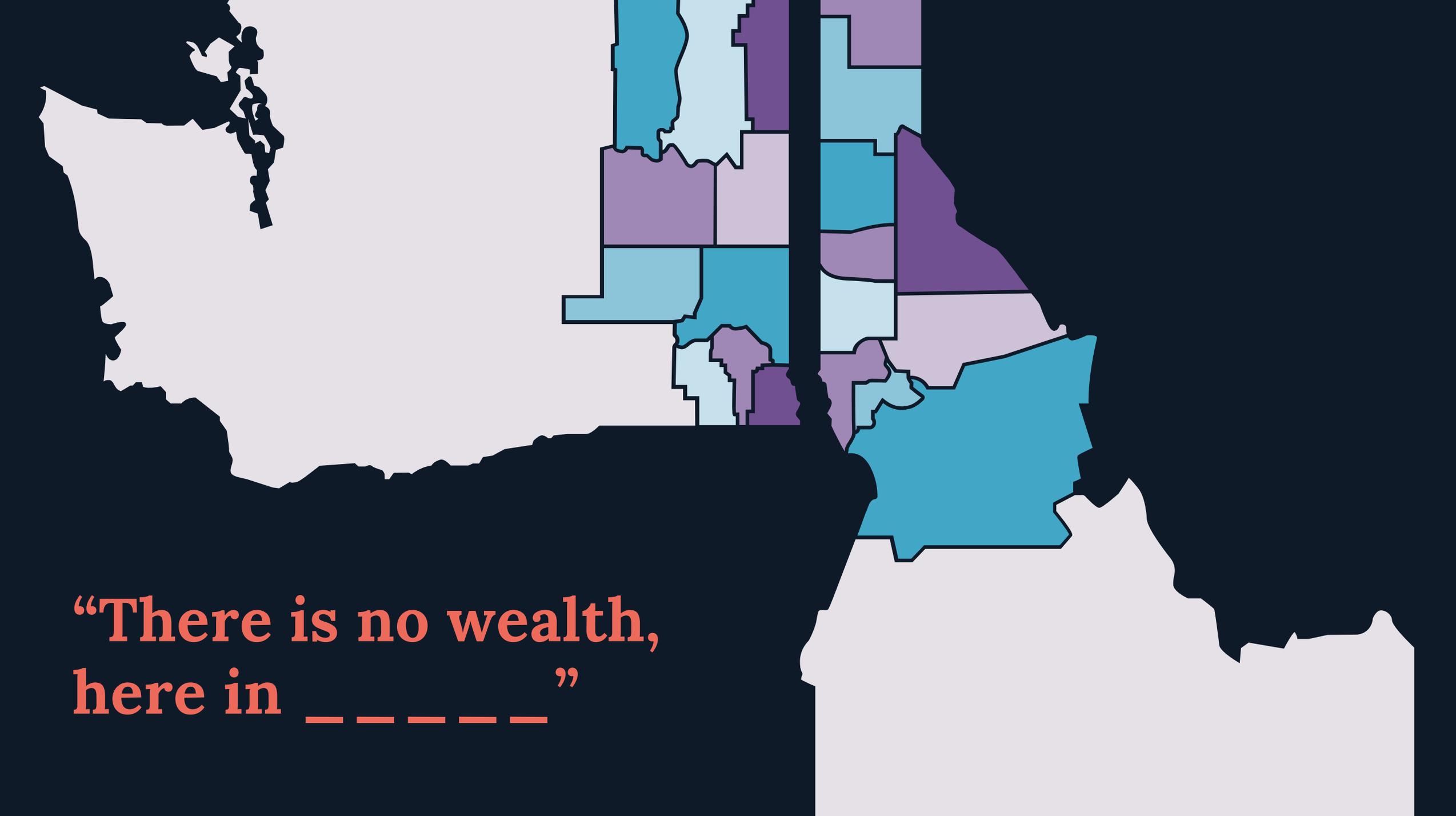
and counting

How charities can tap into the transfer of wealth



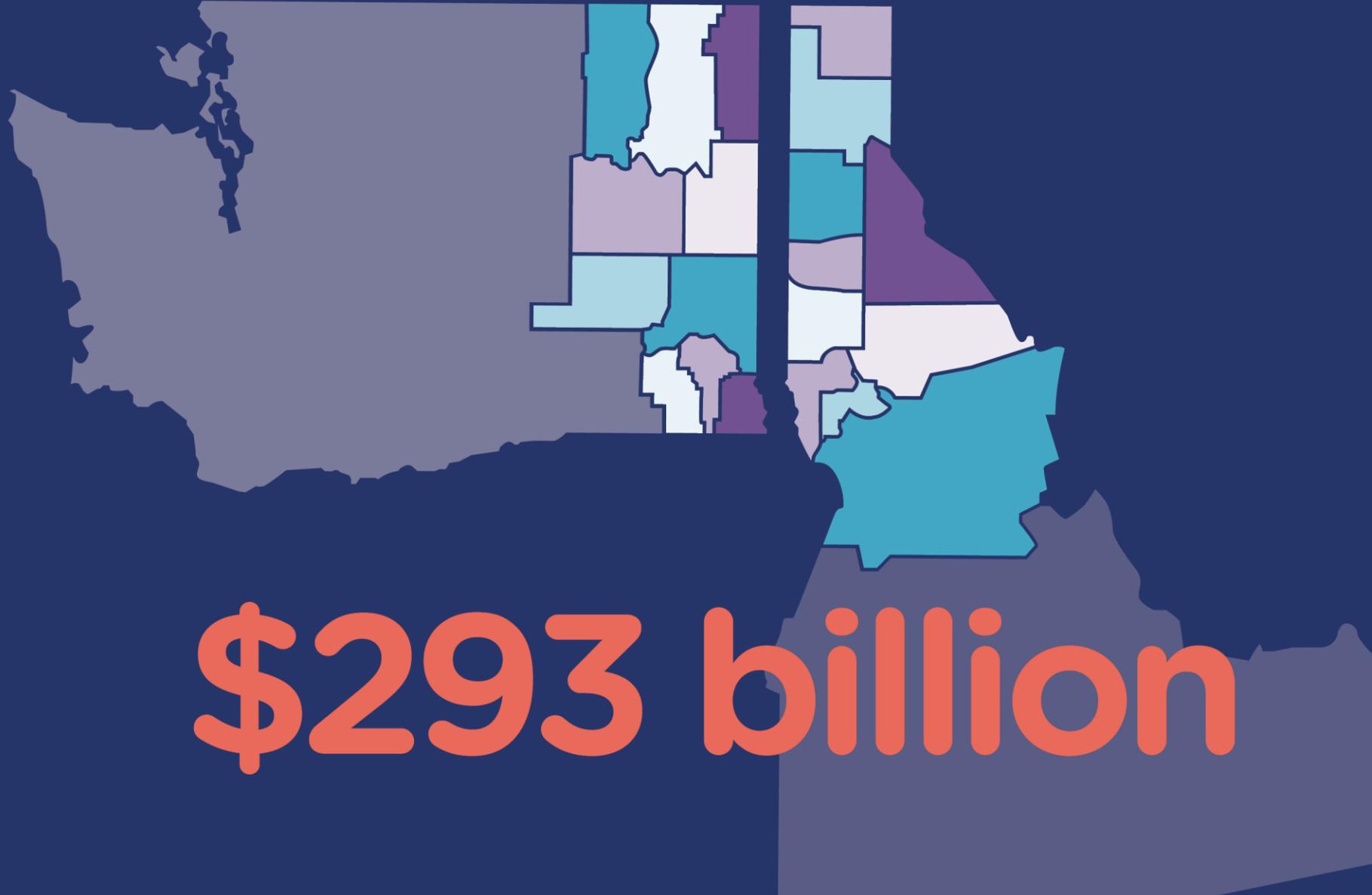
**“Foundations can root
wealth”**

Deb Markley, Locus Impact Investing



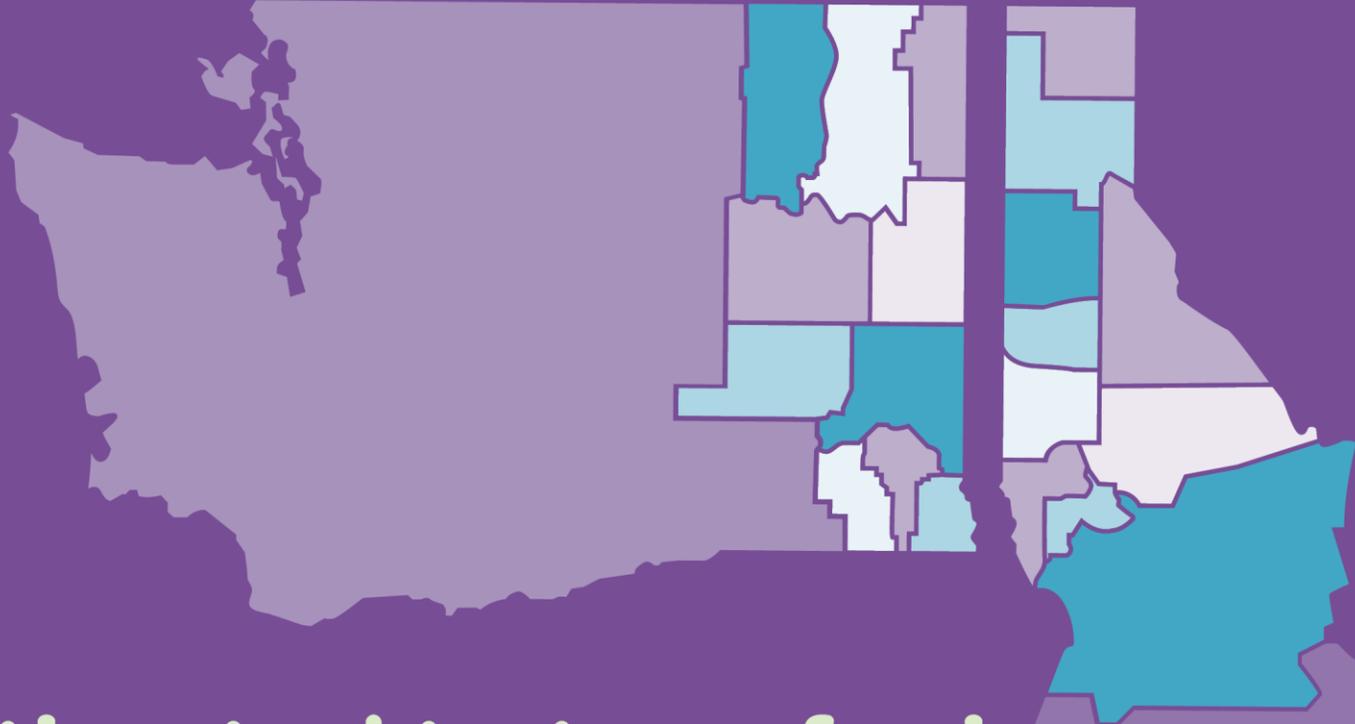
**“There is no wealth,
here in _____”**

Estimated net worth in our region today is



\$293 billion

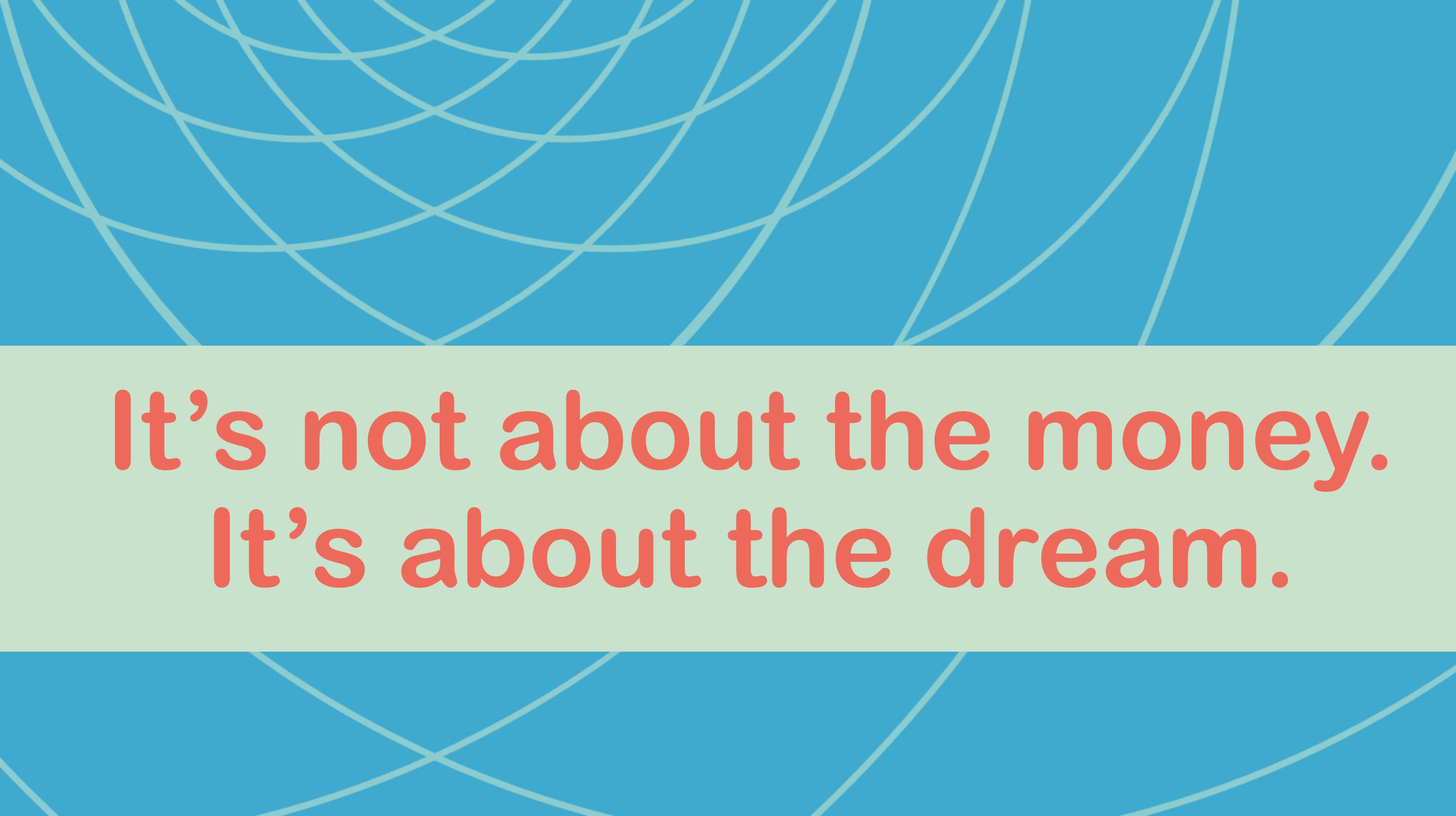
Over the next 10 years,
\$42 billion



is estimated to transfer in our region from
one generation to the next.

Investing **5%** of the regional transfer of wealth in new endowments would provide over



The background features a solid blue color with a pattern of overlapping, light blue curved lines that create a sense of motion and depth. These lines are arranged in a way that suggests a globe or a network of connections.

**It's not about the money.
It's about the dream.**

Southwest Initiative Foundation



Henry Treede

Supporting Organization



Shickley Community Foundation





Margaret F. Galbraith Community Fund

Holt County Economic Development Organization





WHAT NEXT??
**3 Ways We Can Work
Together.**



**Work Together to Raise
Community Awareness**



Create a Shared Vision for Community Endowments



Ignite Generosity Through Vision and Impact



INNOVIA
FOUNDATION

Vibrant and Sustainable Communities

